



**Mike DeWine**, Governor  
**Jon Husted**, Lt. Governor

## Office of Budget and Management

**Kimberly Murnieks**, Director

# OBM Grants Portal



Office of Budget  
and Management

**Reporting Job Aid**

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This Job Aid is to assist those required to report grant activity in the OBM Grants Portal. The following are steps to assist with entering information in the portal. Any guidance documents received from the funding agency should be used in conjunction with this job aid when completing reporting.

- 1) The grant contact will receive an email like the example below approximately two weeks prior to the due date indicating the Activity Report is due.

#### Activity Report Due Reminder for Reporting Sample



The Ohio Grants Partnership <grants@obm.ohio.gov>

Mon 9/28/2020 8:23 AM

To: You

Cc:

Hello Grants Manager:

This email is to notify you that your financial activity report for Reporting Sample is due on October 5, 2020. Kindly login to the Grants Portal at <https://grantsportal.ohio.gov> and complete.

Before you begin, please be prepared to provide the following information:

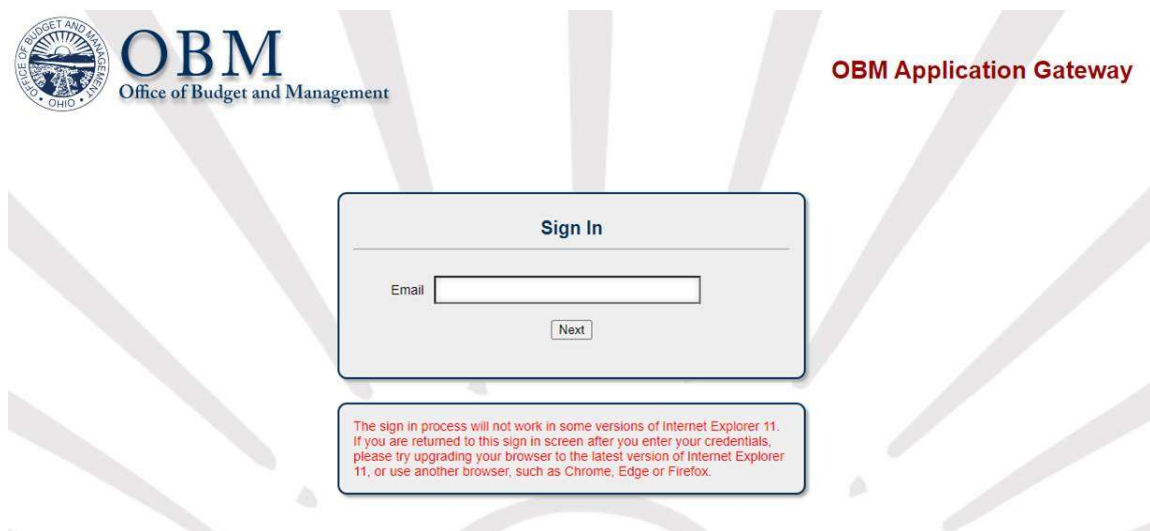
1. **Receipts.** If this is your first Activity Report, this will be the full distribution your organization received. For subsequent Activity Reports, this amount will be \$0 unless your organization received additional funds.
2. **Interest.** If your distribution was placed in an interest bearing account, enter the amount of interest gained on the balance during the reporting period.
3. **Expenditures.** Provide the total expenditure amount for the reporting period.
4. **Expenditure activities.** Be prepared to categorize activities that equal the total expenditure amount. You will be asked to select a category, provide a description and an amount. The following categories apply to this award:
  - Other/Items not listed elsewhere
  - Payroll for public health and safety employees
  - Personal Protective Equipment
  - Small Business Assistance


Please do not reply to this e-mail. You may contact the Ohio Grants Partnership at [grants@obm.ohio.gov](mailto:grants@obm.ohio.gov) if you have any questions or need assistance with this task.

Sincerely,

The Ohio Grants Partnership

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- 2) You can use the e-mail to click the link to the Grants Portal or go there directly at [grantsportal.ohio.gov](http://grantsportal.ohio.gov). This will bring you to the sign in page. Sign in and you are ready to begin your reporting.



 **OBM**  
Office of Budget and Management

**OBM Application Gateway**

**Sign In**

Email

The sign in process will not work in some versions of Internet Explorer 11. If you are returned to this sign in screen after you enter your credentials, please try upgrading your browser to the latest version of Internet Explorer 11, or use another browser, such as Chrome, Edge or Firefox.

- 
- 
- 3) After successfully signing in, you will be brought to the screen below. Click on “My Awards”



**Ohio** | Ohio Grants Portal

OHIO GRANTS PORTAL MY AWARDS

HOME **The Ohio Grants Portal**

Welcome to the Ohio Grants Portal!

As a Subrecipient, access this website to fill out Activity Reports for awards administered through the Ohio Office of Budget and Management. Before an activity is due, you will receive an email that will provide a link to login to this website, along with more information. The Activity Report will ask you to identify activities and funding details for the funds you received on a monthly basis.

As a State of Ohio Agency, you may post Funding Opportunities that will be visible to the public from the Ohio Grants website.

Stay tuned as we continue to build functionality in this portal.

- 4) Clicking “My Awards” will bring you to the screen below. Click “Submit an Activity Report” at the left side of the screen.

Ohio Grants Portal

OHIO GRANTS PORTAL MY AWARDS

Select Award: Gene's District Board of Health II - NFO-3 - Yes Application Questions / Yes Registration / Description Entered / No Matching / Login Activity Report

▼ Activity Reports

Your Activity Report for NFO-3 - Yes Application Questions / Yes Registration / Description Entered / Login Activity Report is due by 09/10/2020.

Activity Report History

Reviewed	Sent Back	Due Date	Beginning	Receipts	Interest Earned	Expenditures	Cash On Hand	Obligated	Unobligated Bal
0 Records Displayed									
0 Total Records									

Submit an Activity Report

▼ Documents

Upload File(s)

Add Files

Click the first file or folder, and then press and hold the Ctrl key. While holding down the Ctrl key, click each of the other files or folders you want to select.

Save

► Application

► Funding Opportunity Details

- 5) After clicking on Submit an Activity Report, a pop-up window will generate confirming you want to submit a report. Click “Yes.”

**Ohio** Ohio Grants Portal

**Date Notification**

Do you want to submit an Activity Report for 09/10/2020?

Yes No

**Summary**

Last Date Submitted  
Reporting Period  
08/01/2020 - 08/02/2020  
Due Date  
09/10/2020  
Beginning Balance  
\$0.00

Total Receipts for Reporting Period  
\$0.00 ✓ ⓘ

Interest Earned for Reporting Period  
\* ⓘ

Total Expenditures for Reporting Period  
\* ⓘ

Cash On Hand \$0.00

Amounts Obligated/Encumbered  
\$0.00 ⓘ

Unobligated Balance \$0.00

Save Summary

Submit Activity Report

Back

- 6) It is now time to start entering receipts, interest earned, expenditures, and encumbrances for the reporting period (i.e. 3/1 – 9/30, 10/1 – 12/31, etc.). All items with red asterisks must have amounts entered to proceed.

**Ohio** Ohio Grants Portal

OHIO GRANTS MY  
PORTAL AWARDS

**Summary**

Last Date Submitted  
Reporting Period  
08/01/2020 - 08/02/2020  
Due Date  
09/10/2020  
Beginning Balance  
\$0.00

Total Receipts for Reporting Period  
\$0.00 ✓ ⓘ

Interest Earned for Reporting Period  
\* ⓘ

Total Expenditures for Reporting Period  
\* ⓘ

Cash On Hand \$0.00

Amounts Obligated/Encumbered  
\$0.00 ⓘ

Unobligated Balance \$0.00

Save Summary

Submit Activity Report

Back

- 7) When a value is entered in each required field, a green checkmark will appear. Once complete, click “Save Summary.”

Ohio Grants Portal

OHIO GRANTS PORTAL
MY AWARDS

### Summary

Last Date Submitted  
Reporting Period  
08/01/2020 - 08/02/2020

Due Date  
09/10/2020

Beginning Balance  
\$0.00

Total Receipts for Reporting Period  
\$5,000.00 ✓ ⓘ

Interest Earned for Reporting Period  
\$5.00 ✓ ⓘ

Total Expenditures for Reporting Period  
\$4,000.00 ✓ ⓘ

Cash On Hand \$1,005.00

Amounts Obligated/Encumbered  
\$1,005.00 ⓘ

Unobligated Balance \$0.00

Save Summary

### Details

Submit Activity Report

Back

- 8) If you reported an expenditure amount of zero, a window will pop-up indicating that detailed reporting is not needed. If you reported expenditures, see remaining steps to detail your expenditures and submit your report.

Ohio Grants Portal

OHIO GRANTS PORTAL
MY AWARDS

Select Award
Gene's District Board of Health II - NFO-3 - Yes Application Question
Submit Activity Report

Activity Reports

Notification
Since expenditures are \$0, detail reporting is not needed.
Ok

Activity Report History

	Reviewed	Sent Back	Due Date	Beginning	Receipts	Interest Earned	Expenditures	Cash On Hand	Obligated	Unobligated Bal	Final	
Open/Edit			09/10/2020	\$0.00	\$5,000.00	\$5.00	\$6,000.00	-\$995.00	\$1,105.00	-\$2,100.00		
Open/Edit			09/17/2020	-\$995.00	\$0.00	\$2,300.00	\$1,200.00	\$105.00	\$300.00	-\$195.00		
Open/Edit			09/27/2020	\$105.00	\$0.00	\$0.00	\$100.00	\$5.00	\$0.00	\$5.00		
Open/Edit			10/01/2020	\$5.00	\$0.00	\$5.00	\$0.00	\$10.00	\$0.00	\$10.00	✓	

0 Records Displayed 4 Total Records

No Activity Reporting is Required At This Time.

Submit an Activity Report

- 9) If you reported summary expenditures during the period, you are required to classify your expenditures by category in the Details section of the report. Click the “Add New” button to classify your expenditures.

Ohio Grants Portal

OHIO GRANTS PORTAL

MY AWARDS

### Summary

Last Date Submitted  
12/22/2020 3:22:30 PM

Reporting Period  
01/01/1900 - 01/01/1900

Due Date  
09/10/2020

Beginning Balance  
\$0.00

Total Receipts for Reporting Period  
\$5,000.00 ✓ ⓘ

Interest Earned for Reporting Period  
\$5.00 ✓ ⓘ

Total Expenditures for Reporting Period  
\$4,000.00 ✓ ⓘ

Cash On Hand \$1,005.00

Amounts Obligated/Encumbered  
\$1,005.00 ⓘ

Unobligated Balance \$0.00

Save Summary

### Details

Total Activities should equal Total Expenditures for Reporting Period of \$4,000.00

Activity	Description	Expenditure
0 Records Displayed		

0 Total Records

Add New Activity

Total Expenditures: **\$0.00**  
The Submit Activity Report button will be available once your activity expenditure total in the Details section equals the Total Expenditures for Reporting Period in the Summary section.

Submit Activity Report

Back

10) A pop-up window will generate to allow you to select a project/activity from a drop-down menu, then enter free form text to best describe the project/activity and list the amount of expenditures for that project/activity. Once complete, click "Save."

Ohio Grants Portal

OHIO GRANTS PORTAL

MY AWARDS

### Summary

Last Date Submitted  
12/22/2020 3:22:30 PM

Reporting Period  
01/01/1900 - 01/01/1900

Due Date  
09/10/2020

Beginning Balance  
\$0.00

Total Receipts for Reporting Period  
\$5,000.00 ✓ ⓘ

Interest Earned for Reporting Period  
\$5.00 ✓ ⓘ

Total Expenditures for Reporting Period  
\$4,000.00 ✓ ⓘ

Cash On Hand \$1,005.00

Amounts Obligated/Encumbered  
\$1,005.00 ⓘ

Unobligated Balance \$0.00

Save Summary

### Details

Total Activities should equal Total Expenditures for Reporting Period of \$4,000.00

Activity	Description	Expenditure
0 Records Displayed		

0 Total Records

Add New Activity

Total Expenditures: **\$0.00**  
The Submit Activity Report button will be available once your activity expenditure total in the Details section equals the Total Expenditures for Reporting Period in the Summary section.

Submit Activity Report

Back

Add Activity

Project/Activity For Expenditure

Personal Protective Equipment ✓

Describe Project/Activity

Masks, gowns, gloves


Expenditure Amount

\$1,000.00 ✓

Save



Close

- 11) After clicking save, your activity entered will be presented in the grid as shown below. The Submit Activity button will be grayed out until the total expenditures in the Details section matches the total expenditures in the Summary section.



Ohio Grants Portal

OHIO GRANTS PORTALMY AWARDS




**Summary**

Last Date Submitted  
12/22/2020 3:22:30 PM  
Reporting Period  
01/01/1900 - 01/01/1900  
Due Date  
09/10/2020  
Beginning Balance  
\$0.00  
Total Receipts for Reporting Period  
\$5,000.00 ✓ ⓘ  
Interest Earned for Reporting Period  
\$5.00 ✓ ⓘ  
Total Expenditures for Reporting Period  
\$4,000.00 ✓ ⓘ  
Cash On Hand \$1,005.00  
Amounts Obligated/Encumbered  
\$1,005.00 ⓘ  
Unobligated Balance \$0.00  
**Save Summary**

**Details**

Total Activities should equal Total Expenditures for Reporting Period of \$4,000.00

	Activity	Description	Expenditure		
<b>Edit</b>	Personal Protective Equipment	Masks, gowns, gloves	\$1,000.00	<b>Delete</b>	

0 Records Displayed1 Total Records

**Add New Activity**

Total Expenditures: **\$1,000.00**  
The Submit Activity Report button will be available once your activity expenditure total in the Details section equals the Total Expenditures for Reporting Period in the Summary section.

**Submit Activity Report**

**Back**

- 12) Click “Add New Activity” and continue to do this for each category until all expenditures have been accounted for in a category. You may enter the same activity more than once if you need to separate based on activity description. When the expenditure total in the Details section matches the expenditure total in the Summary section, you will have the ability to submit the activity report.



Ohio Grants Portal

OHIO GRANTS PORTAL

MY AWARDS

### Summary

Last Date Submitted  
12/22/2020 3:22:30 PM

Reporting Period  
01/01/1900 - 01/01/1900

Due Date  
09/10/2020

Beginning Balance  
\$0.00

Total Receipts for Reporting Period  
\$5,000.00 ✓ ⓘ

Interest Earned for Reporting Period  
\$5.00 ✓ ⓘ

Total Expenditures for Reporting Period  
\$4,000.00 ✓ ⓘ

Cash On Hand \$1,005.00

Amounts Obligated/Encumbered  
\$1,005.00 ⓘ

Unobligated Balance \$0.00

Save Summary

### Details

Total Activities should equal Total Expenditures for Reporting Period of \$4,000.00

	Activity	Description	Expenditure		
Edit	Personal Protective Equipment	Masks, gowns, gloves	\$1,000.00	Delete	
Edit	Public health expenses	Social distancing measures, touchless faucets, disinfection of public areas	\$2,000.00	Delete	
Edit	Small Business Assistance	Small business economic relief grants	\$1,000.00	Delete	

0 Records Displayed 3 Total Records

Add New Activity

Total Expenditures: **\$4,000.00**

Please click the Submit Activity Report button to finalize your Activity Report.

Submit Activity Report

Back

13)Once complete click “Submit Activity Report” and a pop-up window will generate notifying you that your activity report was successfully submitted.

***You are now finished with your Activity Report. You may go back and edit the report up until the due date of the report.***

## ***Closeout Process:***

Once you finish expending all your grant funds you need to submit a final report to closeout your reporting.

- 1) If your most recent report is not yet in “Reviewed” status and you do not have any additional activity to report (i.e. receipts, interest, and expenditures), go to “My Awards,” select Open/Edit next to your most recently submitted report, and follow the instructions in Steps 3-9 below. Otherwise, follow Steps 1-5 above, to select a new report to submit, then follow the instructions in Steps 2-9 below.
  
- 2) For the current period, enter the receipts, interest earned, and expenditures in the Summary section of the report. Since this is the final report you shouldn’t have any obligations/encumbrances. If you enter an obligated/encumbered

amount other than zero, the “Close Out Report” box will be grayed out and you won’t be able to submit a final report.

Ohio

Ohio Grants Portal

OHIO GRANTS

PORTAL

MY

AWARDS

Summary

Last Date Submitted

2/24/2021 2:01:04 PM

Reporting Period

08/06/2020 - 08/07/2020

Due Date

10/08/2020

Beginning Balance

\$195.00

Total Receipts for Reporting Period

\$100.00

✓

Interest Earned for Reporting Period

\$5.00

✓

Total Expenditures for Reporting Period

\$300.00

✓

Cash On Hand

\$0.00

Amounts Obligated/Encumbered

\$0.00

Unobligated Balance

\$0.00

☐ Close Out Report?

Save Summary


Details

Submit Activity Report

Back



- 3) Review your cash on hand amount to ensure it is appropriate. If you don’t have any unspent grant funding to return to the funding agency, your cash on hand amount should equal zero. If you plan to return unspent funding to the funding

agency, your cash on hand amount should equal the amount of funding you are returning. Once your cash on hand amount is verified, click the “Close Out Report” box.

Ohio Grants Portal

OHIO GRANTS  
PORTAL

MY  
AWARDS


### Summary


Last Date Submitted  
2/24/2021 2:01:04 PM


Reporting Period  
08/06/2020 - 08/07/2020

Due Date  
10/08/2020


Beginning Balance  
\$195.00

Total Receipts for Reporting Period  
\$100.00 ✓ 


Interest Earned for Reporting Period  
\$5.00 ✓ 

Total Expenditures for Reporting Period  
\$300.00 ✓ 

Cash On Hand \$0.00

Amounts Obligated/Encumbered  
\$0.00 

Unobligated Balance \$0.00

☒ Close Out Report? 

Save Summary

### Details

Submit Activity Report

Back

- 4) Click “Save Summary” and a window will pop-up asking you to confirm that you completed spending for your award. Click “Yes.”

The screenshot shows the Ohio Grants Portal interface. The 'Summary' tab is active, displaying the following information:

- Last Date Submitted: 2/24/2021 2:01:04 PM
- Reporting Period: 08/06/2020 - 08/07/2020
- Due Date: 10/08/2020
- Beginning Balance: \$195.00
- Total Receipts for Reporting Period: \$100.00
- Interest Earned for Reporting Period: \$5.00
- Total Expenditures for Reporting Period: \$300.00
- Cash On Hand: \$0.00
- Amounts Obligated/Encumbered: \$0.00
- Unobligated Balance: \$0.00
- Close Out Report? ☒

A 'Close Out Notification' pop-up window is displayed, asking: "By checking Close Out Report, you are indicating that you have completed spending funds for this award. If you have a balance in Cash on Hand, you will receive instructions to return unspent funds. Are you sure this will be your Close Out Report?" The window has 'Yes' and 'No' buttons.

- 5) If you reported an expenditure amount of zero, a window will pop-up indicating that detailed reporting is not needed. If you reported expenditures, see remaining steps to complete the closeout process.

The screenshot shows the Ohio Grants Portal interface. The 'Activity Reports' section is active, displaying the following information:

- Select Award: Gene's District Board of Health II - NFO-3 - Yes Application Question
- Activity Report History table:



	Reviewed	Sent Back	Due Date	Beginning	Receipts	Interest Earned	Expenditures	Cash On Hand	Obligated	Unobligated Bal	Final	
Open/Edit			09/10/2020	\$0.00	\$5,000.00	\$5.00	\$6,000.00	-\$995.00	\$1,105.00	-\$2,100.00		
Open/Edit			09/17/2020	-\$995.00	\$0.00	\$2,300.00	\$1,200.00	\$105.00	\$300.00	-\$195.00		
Open/Edit			09/27/2020	\$105.00	\$0.00	\$0.00	\$100.00	\$5.00	\$0.00	\$5.00		
Open/Edit			10/01/2020	\$5.00	\$0.00	\$5.00	\$0.00	\$10.00	\$0.00	\$10.00	✓	

A 'Notification' pop-up window is displayed, asking: "Since expenditures are \$0, detail reporting is not needed." The window has an 'Ok' button.

- 6) If you have expenditures to report in this period, click “Add New Activity.” Then enter the expenditure activity, description, and amount and click “Save.” Continue to do this for each category until all expenditures have been accounted for in a

category. You may enter the same activity more than once if you need to separate based on activity description. When the expenditure total in the Details section matches the expenditure total in the Summary section, you will have the ability to submit the activity report.

Ohio | Ohio Grants Portal


**Summary**


Last Date Submitted  
2/24/2021 2:01:04 PM


Reporting Period  
08/05/2020 - 08/06/2020

Due Date  
10/01/2020


Beginning Balance  
\$5.00

Total Receipts for Reporting Period  
 

Interest Earned for Reporting Period  
 

Total Expenditures for Reporting Period  
 

Cash On Hand **\$10.00**


Amounts Obligated/Encumbered  
 


Unobligated Balance **\$10.00**

☒ Final Report?

Save Summary

**Details**

Total Activities should equal Total Expenditures for Reporting Period of \$1,000.00 

	Activity	Description	Expenditure		
Edit	Personal Protective Equipment	Masks, gowns, and gloves	\$100.00	Delete	

0 Records Displayed1 Total Records

Add New Activity

Total Expenditures: **\$100.00**

The Submit Activity Report button will be available once your activity expenditure total in the Details section equals the Total Expenditures for Reporting Period in the Summary section.

Submit Activity Report

- Once complete click "Submit Activity Report" and a window will pop-up to notify you that your activity report was successfully submitted.

Ohio

Ohio Grants Portal

Activity Report Save Notification

Activity Report for Due Date 10/08/2020 was successfully submitted.

OK

Summary

Last Date Submitted

6/21/2021 2:22:31 PM

Reporting Period

08/06/2020 - 08/07/2020

Due Date

10/08/2020

Beginning Balance

\$195.00

Total Receipts for Reporting Period

\$100.00

Interest Earned for Reporting Period

\$5.00

Total Expenditures for Reporting Period

\$300.00

Cash On Hand \$0.00

Amounts Obligated/Encumbered

\$0.00

Unobligated Balance \$0.00

☒ Close Out Report?

Save Summary

Details

Total Activities should equal total Expenditures for Reporting Period of \$300.00

	Activity	Description	Expenditure		
Edit	Personal Protective Equipment	Masks, gowns, and gloves	\$300.00	Delete	

0 Records Displayed

1 Total Records

Add New Activity

Total Expenditures: \$300.00

Please click the Submit Activity Report button to finalize your Activity Report.

Submit Activity Report

- 8) After you submit your close out report, you'll notice a checkmark is included in the "Final" column of the submitted Activity Report which indicates the close out report was successfully submitted.

Ohio

Ohio Grants Portal

Select Award

Gene's District Board of Health II - NFO-3 - Yes Application Questions / Yes Registration / Description Entered / No Matching / Login Activity Report

Activity Reports

Activity Report History

	Reviewed	Sent Back	Due Date	Beginning	Receipts	Interest Earned	Expenditures	Cash On Hand	Obligated	Unobligated Bal	Final	
Open/Edit			09/10/2020	\$0.00	\$5,000.00	\$5.00	\$6,000.00	-\$995.00	\$1,105.00	-\$2,100.00		
Open/Edit			09/17/2020	-\$995.00	\$0.00	\$2,300.00	\$1,200.00	\$105.00	\$300.00	-\$195.00		
Open/Edit			09/27/2020	\$105.00	\$0.00	\$0.00	\$100.00	\$5.00	\$0.00	\$5.00		
Open/Edit			10/01/2020	\$5.00	\$200.00	\$5.00	\$15.00	\$195.00	\$0.00	\$195.00		
Open/Edit			10/08/2020	\$195.00	\$100.00	\$5.00	\$300.00	\$0.00	\$0.00	\$0.00	✓	

0 Records Displayed

5 Total Records

No Activity Reporting is Required At This Time.

Submit an Activity Report

- 9) If you have a cash on hand balance remaining after submitting the report, you'll receive an automated email listing the amount of unspent funds needing to be returned and when/where the funds need to be returned.